Managing Meetings

Meetings are costly in time, salaries, facilities expenses, etc., and we can avoid many of them. We should approach meetings like any project: assess need; design appropriate response; implement; follow-up; and, monitor and evaluate for effectiveness.

The Checklist

Before the Meeting
1. Why hold a meeting?
   - Review alternatives
2. What's the meeting about?
   - Develop an agenda balancing topics and speakers to ensure an even flow
   - Circulate the agenda
   - Ensure availability of necessary documents and other materials
3. When is the meeting?
   - Set a date and time
   - Evaluate regularity
4. Where is the meeting?
   - Find a venue accessible to everyone
   - Ensure venue meets security, safety and privacy needs
   - Ensure venue meets space, light and temperature needs
   - Ensure participants can see each other: organize tables in a circle, a square or a “U”
   - Ensure venue has necessary facilities, equipment and refreshments
5. Who needs to be there?
   - Invite people in a timely manner
   - Maintain a participant list

During the Meeting
6. How do you begin?
   - Welcome participants and announce the reason for the meeting
   - Invite introductions from all participants
   - Agree ground rules (mobile phones on silent, no side meetings, etc.)
   - Agree the agenda including duration of the meeting
   - Agree relevant procedures such as speaking rights, decision making, etc.
   - Approve minutes from the previous meeting
7. How do you chair?
   - Manage: Create opportunities, limit domination, digression, disruption
   - Facilitate: Start and end the meeting, encourage discussion, move things along
   - Clarify: Ask questions, restate concepts, ensure understanding
   - Summarize: Condense ideas, record points, provide a framework/order
   - Use visuals where appropriate: flipchart, maps, projections, etc.
   - Keep time
8. How do you end?
   - Agree action items including timeframe and persons responsible
   - Close the meeting on a positive note

After the Meeting
9. What follow up is necessary?
   - Circulate draft minutes including action items within a week of the meeting
   - Follow up on the meeting as per agreed actions
   - Evaluate effectiveness